ACG® Orange County
Association for Corporate Growth

ACADEMY

UCI Paul Merage School of Business

MERGERS & ACQUISITIONS ACADEMY SERIES:

Presented By:

MOSSADAMS

Family Office Transitions

How to Select Advisors, Create Liquidity and Determine Investment Strategies

Panel Discussion Featuring UCI and ACG OC Experts in Finance

Our presentation and discussion will address the issues involved in transitioning a family business to a family office. Panelists will share insights related to the roles and recruitment of your advisory team, as well as strategies for achieving optimal liquidity and investment outcomes.

Featuring:

Christopher Schwartz, PhD
Associate Director of Finance and Faculty Director, Center for Investment and Wealth Management, UC Irvine, The Paul Merage School of Business

Lauren Peterson
Senior Vice President, Private Client Advisor, U.S. Trust, Bank of America Wealth Management

Brian G. Bissell, CFP®, CTFA
Vice President, Client Advisor, Whittier Trust

Benedict O. Kwon, Esq.
Shareholder, Stradling

When:

December 20, 2017
11:30 AM – Registration/Networking
12:00 PM – 1:00 PM (Panel)

Where:

UCI-Colloquium Room
The Paul Merage School of Business
4291 Pereira Drive, SB1, Fifth Floor
Irvine, CA 92697

Registration Fees:

Member: $50
Non-Member: $70
At the door - Member: $70
Non-Member: $90
Lunch (sandwiches) included

For more information, email: info@acgoc.org

Register Here